



Partnering and Leadership Successes

**Member Business Lending
A PALS Workshop for Credit Unions
October 16, 2003
Wyndham Hotel
1400 M St. NW, Washington, DC**



8:00 a.m. *Continental Breakfast/Registration/Networking*

8:30 a.m. *Welcoming Remarks*

- ✦ NCUA Board Members Debbie Matz and JoAnn Johnson
- ✦ CUNA President & CEO Dan Mica

9:00 a.m. *Succeeding with Member Business Loans – Credit Union Experiences*

Facilitator: Jim McCormack, President, Pennsylvania CU Association

- ✦ Gary Base, CEO, Community CU, Plano, Texas
- ✦ Bruce Beaudette, CEO, Sunmark FCU, Schenectady, N.Y.
- ✦ Lillian Bent, CEO, Union Settlement FCU, New York City
- ✦ Parker Cann, Executive Vice President, Arrowhead CU, San Bernardino, Calif.
- ✦ David Coggins, President, Business Lending Group, Fox Valley, Wis.

10:30 a.m. *Break*

10:45 a.m. *Managing Member Business Lending Legal Requirements*

Facilitator: Rick Pillow, President, Virginia & D.C. CU Leagues

- ✦ Bob Fenner, General Counsel, NCUA
- ✦ David Javdan, General Counsel, Small Business Administration
- ✦ Eric Richard, General Counsel, CUNA
- ✦ Marc Schaefer, CEO, Truiliant FCU, Winston-Salem, N.C.

Noon *Networking Lunch*

1:15 p.m. *Minimizing Member Business Lending Risk*

Facilitator: Mike Marschall, Acting President, Maryland CU League

- ✦ Bill Hampel, Senior Vice President of Research & Policy Analysis, CUNA
- ✦ Roger Little, Deputy Commissioner, Michigan Division of Financial Institutions
- ✦ Maggie Miller, Principal Examiner, NCUA Region 2
- ✦ Marcia Sarrazin, Director of Supervision, NCUA Office of Examination & Insurance

2:30 p.m. *Break*

2:45 p.m. *Resources, Support and Partnering Opportunities*

Facilitator: Grace Mayo, CEO, Telesis FCU, Chatsworth, Calif.

- ✦ Joanna Bruno, President, J.R. Bruno & Associates, Glendora, Calif.
- ✦ Kathy Garner, CEO, Northwest Corporate FCU, Portland, Ore.
- ✦ Jim Hammersley, Director of Portfolio Management, Small Business Administration
- ✦ Mike Hearne, SBA Consultant, CUNA
- ✦ Rick Wargo, Senior Vice President, Pennsylvania CU Association, CU BizSource

4:15 p.m. *Concluding Remarks*

- ✦ NCUA Board Members Debbie Matz and JoAnn Johnson